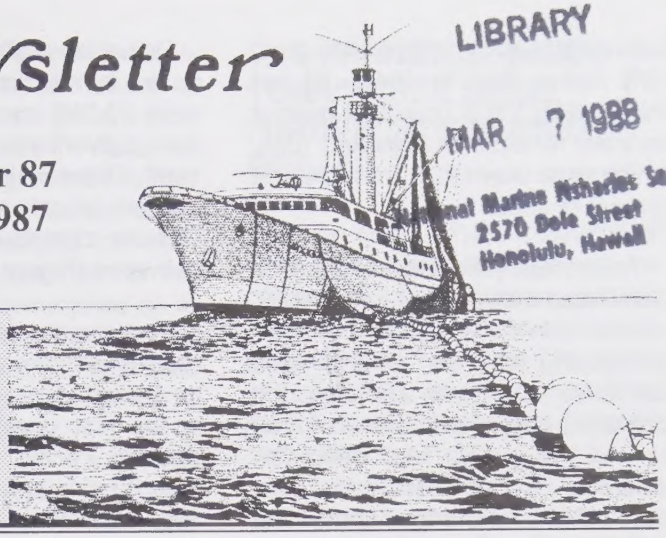
#87

Tuna Newsletter

Issue number 87
November 1987

LIBRARY
MAR 7 1988
National Marine Fisheries Service
2570 Dole Street
Honolulu, Hawaii



National Marine Fisheries Service

- **Southwest Region**
- **Southwest Fisheries Center**

IN THIS ISSUE

- The number of U.S. tuna purse seiners active during the first quarter of 1987 was down 4% compared to the number active during the first quarter of 1986. The decrease was primarily a result of decreased fishing in the western Atlantic.
- In the first quarter of 1987, deliveries by U.S. vessels to U.S. canneries increased 19% from deliveries in the first quarter of 1986. The biggest component of deliveries was yellowfin tuna.
- U.S. cannery receipts of tuna from foreign suppliers for the first quarter of 1987 decreased 22% from first-quarter receipts in 1986. The major foreign supplier in the first quarter of 1987 was South Korea, supplying 13% of the total foreign imports to U.S. canneries.
- Beginning in 1981, French and Spanish interests have developed a new purse seine fishery in the western Indian Ocean. The fishery, taking skipjack and yellowfin tuna, expanded from 1 vessel in 1981 to 44 in 1986. Catches increased from negligible amounts to over 140,000 metric tons in the 6 years of the fishery.

FORMAT OF TUNA NEWSLETTER EXPANDED

To give our readers a broader view of the world tuna situation, we have expanded the Tuna Newsletter. Beginning with this issue, the Newsletter will feature summary statistics of the U.S. tuna industry, notes on tuna-related research, and short articles on recent developments in the tuna industry throughout the world. Also, with this issue the Tuna Newsletter has now become a joint project of the Southwest Center and Region. Staff of the Southwest Region will be making regular contributions to the Newsletter.

Lillian Vlymen of the Center Director's staff, who served as editor of the Tuna Newsletter from the first issue in December 1972, is stepping down as editor after assembling 86 issues. All readers of the Tuna Newsletter will miss Vlymen's contribution.

Wes Parks,
Editor

THE U.S. TUNA INDUSTRY IN FIRST QUARTER 1987

Deliveries of imported tuna to U.S. canneries decreased in the first quarter of 1987 as European tuna processors, responding to increased world demand for canned tuna, competed more aggressively for raw supplies on the world market.

The number of vessels and total capacity of the U.S. tropical tuna purse seine fleet at sea during the first quarter of 1987 were down by about 4% compared with the same period in 1986 (Table 1). The decrease was due primarily to a decrease in fishing in the western Atlantic. There was no effort by U.S. vessels in the Indian Ocean in the first quarter of 1987.

Table 1. Number of active U.S. purse seine vessels and capacity (short tons)

AREA	FIRST QUARTER 1987	1986
	NO. OF VESSELS	
W. ATL	0	3
E. PAC	34	35
W. PAC	33	32
TOTAL	67	70
	CAPACITY	
W. ATL	0	3,180
E. PAC	33,095	34,095
W. PAC	41,175	39,475
TOTAL	74,270	76,750

Deliveries of all tuna species to U.S. canneries during the first quarter of 1987 totaled 117,503 short tons, down 5 % from deliveries in the first quarter of 1986 (Table 2).

Deliveries by U.S. vessels, although 19% higher than in 1986, did not make up for the drop in first-quarter cannery receipts of imported tuna, which were down 22% from the first quarter of 1986.

As in 1986, yellowfin and skipjack dominated deliveries of tuna to U.S. canneries in the first quarter of 1987, comprising 42% and 37% of total deliveries. Domestic and imported deliveries contributed about equally to total first-quarter 1987 deliveries, whereas imported deliveries contributed 60% of the total in the first quarter of 1986.

Deliveries of albacore to U.S. canneries in the first quarter of 1987 were 23,768 short tons, down 4% from deliveries in the first quarter of 1986. Of the major fishing areas, the western Atlantic and western Pacific Oceans contributed 65% of total deliveries (Figure 1).

First-quarter deliveries of skipjack tuna to U.S. canneries--43,841 short tons--were down 1% from deliveries in the first quarter of 1986. The western Pacific, the major fishing area for skipjack in the first quarter 1987 as well as 1986, contributed 49% of total deliveries (Figure 2).

U.S. cannery receipts of yellowfin tuna for the first quarter of 1987 were 49,894 short tons, down 11% from 1986. As in the first quarter of 1986, the major contributing fishing area was the eastern Pacific Ocean, which contributed 78% of the total (Figure 3).

South Korea and Taiwan were the leading non-U.S. suppliers of raw tuna to U.S. canneries during the first quarter of 1987 (Table 3). In addition to imports received directly from both countries, most tuna imported from Caribbean ports was originally

Table 2. U.S. cannery receipts of domestic and imported raw tuna (short tons) by species for first quarter 1987 and 1986.

YEAR	SOURCE	SPECIES ALB	SJ	YF[1]	TOTAL
1987	DOMESTIC	70	21,546	37,605	59,221
	IMPORTED	23,698	22,295	12,289	58,282
	TOTAL	23,768	43,841	49,894	117,503
1986	DOMESTIC	16	17,465	32,408	49,889
	IMPORTED	24,706	25,815	23,795	74,316
	TOTAL	4,722	43,280	56,203	124,205

[1] Includes a small amount of bigeye and blackfin tuna.

Table 3. U.S. cannery imports of raw tuna (short tons) by species and country for first quarter 1987.[1] Also listed are total imports for first quarter 1987 and 1986.

COUNTRY	SPECIES ALB	SJ	YF[2]	TOTAL 1987	1986
SOUTH KOREA	3,422	1,222	2,435	7,527	5,467
IVORY COAST	0	5,978	1,006	7,045	8,245
SEYCHELLES	0	4,584	11	6,032	10,218
VENEZUELA	0	2,333	2,272	4,896	8,497
TAIWAN	3,787	48	193	4,325	3,688
NETH.ANTILLES	3,484	0	1	3,486	3,752
TRINIDAD	2,959	26	154	3,374	1,814
ECUADOR	0	2,743	447	3,190	352
CAYMAN IS.	0	2,099	827	2,926	0
CANARY IS.	2,802	0	3	2,808	2,133
MAURITIUS	2,432	0	0	2,432	1,541
SOUTH AFRICA	2,231	0	0	2,231	5,715
VANUATU	0	1,433	687	2,120	0
PANAMA	0	111	1,176	1,287	10,669
BRAZIL	0	1,153	5	1,159	4,608
OTHER	2,582	566	298	3,444	7,618
TOTAL	23,698	22,295	12,289	58,282	74,317

[1] Country is either flag country of vessel or country exporting to the U.S.
[2] Includes a small amount of bigeye and blackfin tuna.

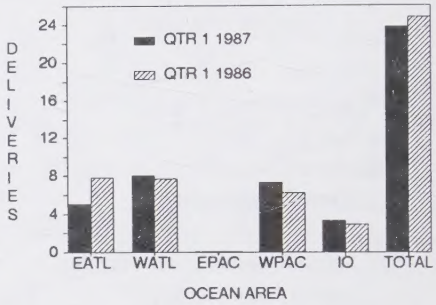


Fig. 1. Deliveries of albacore to U.S. canneries (1000 short tons) by ocean area of capture.

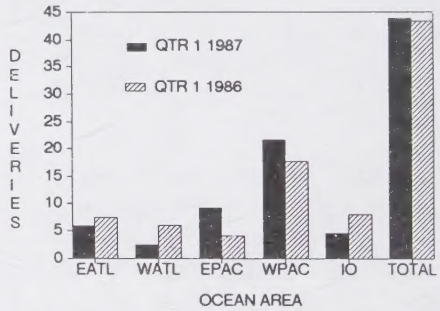


Fig. 2. Deliveries of skipjack tuna to U.S. canneries (1000 short tons) by ocean area of capture.

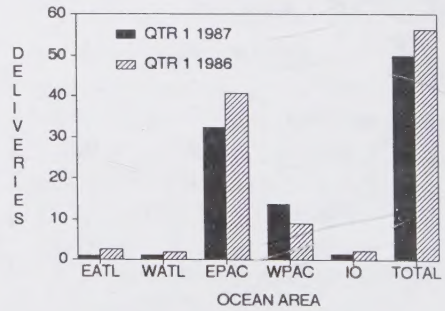


Fig. 3. Deliveries of yellowfin tuna to U.S. canneries (1000 short tons) by ocean area of capture.

caught by South Korean and Taiwanese vessels.

Imports from Brazil, the Seychelles, South Africa and Venezuela decreased significantly in the first quarter of 1987. Although Panamanian exports are listed as decreasing, this apparent decrease was primarily a result of a change in reporting methods rather than a real decline in shipments passing through Panamanian ports from other exporting nations.

Contract prices for U.S. vessels delivering raw tuna to U.S. canneries in Puerto Rico were essentially the same in the first quarter of 1987 as they were for the same period in 1986 (Table 4). Prices reported are prices paid to U.S. domestic contract vessels. Prices paid to non-contract domestic and foreign vessels vary according to market conditions. During the first quarter of 1987, non-contract vessels were being offered premiums ranging from $20 to $40 per ton above contract prices as a result of increased competition for supplies of raw tuna on the world market.

Wholesale list prices for tuna packed in water in the first quarter of 1987 differed little from prices for the same period in 1986. Prices, as reported by cannery representatives and brokers, for advertised-label, white meat tuna ranged between $55.40 and $55.95 per case of 24, 12.5 oz cans, the same price as in 1986 (Table 5). The price range for private-label, white meat tuna was $43.50 to $45.50 per case, up 4% to 8% over the 1986 price.

Wholesale list prices for advertised-label, light meat tuna canned in water were $34.20 to $43.45 per case of 48, 6.5 oz cans, identical to prices in the first quarter of 1986. Prices for private-label, light meat tuna were $23.00 to $26.50 per case, down 2% to 15% compared with 1986 prices.

Wholesale canned tuna prices can be expected to rise later this year as a result of higher prices paid for supplies of raw tuna in the first quarter of 1987.

Pat Donley, SWR
Earl Weber, SWFC
Wes Parks, SWFC

Table 4. Contract prices (U.S.$ per short ton) for raw skipjack and yellowfin tuna delivered by U.S. vessels to U.S. canneries in Puerto Rico for first quarter 1987 and 1986.

	SKIPJACK		YELLOWFIN	
SIZE CLASS (lbs)	**1987**	**1986**	**1987**	**1986**
20 +	-	-	765-780	780-800
7.5 to 20	685-700	700	685-700	700
4 to 7.5	615-630	630	615-630	630
3 to 4	485-500	500	485-500	500
3 -	285-300	300	285-300	300

Table 5. Wholesale list price in California for tuna canned in water for representative case packs (U.S. $ per short ton) for first quarter 1987 and 1986.

CASE PACK	YEAR	ADVERTISED LABEL	PRIVATE LABEL
White meat[1]	1987	55.40 - 55.95	43.50 - 45.50
	1986	54.75 - 55.95	42.00
Light meat[2]	1987	34.20 - 43.45	23.00 - 26.50
	1986	34.20 - 43.45	27.00

[1]White meat: solid, 12.5 oz (24)
[2]Light meat: chunk, 6.5 oz (48)

THE FRENCH/SPANISH TUNA PURSE SEINE FISHERY IN THE INDIAN OCEAN

Editor's note. Tuna research at SWFC is conducted in nine projects of the SWFC Tuna Program, located at the Center's Honolulu and La Jolla laboratories. The Tuna Newsletter will feature articles describing recent investigations by Program scientists.

A major new tuna fishery has emerged in the Indian Ocean, the French/Spanish purse seine fishery. Following successful exploratory fishing in the early 1980's, French and Spanish interests developed a new purse seine fishery for skipjack and yellowfin tuna in the western Indian Ocean. Annual catches in this rapidly developing fishery increased from negligible amounts in the first years of the fishery to 139 thousand metric tons in 1987.

Scientists at the Southwest Fisheries Center recently began assembling data on tuna fisheries in the Indian Ocean. As they compiled the data they tracked the development of this major new fishery. The data are compiled from collections maintained by the Food and Agriculture Organization (FAO) of the United Nations, FAO's Indo-Pacific Tuna Development and Management Program and the Seychelles Fishing Authority.

The French/Spanish fleet catches primarily skipjack and yellowfin tuna. The fleet, which operates exclusively in the western Indian Ocean, took 44% of the combined Indian Ocean catch of skipjack and yellowfin in 1985.

Skipjack and yellowfin tuna have been the primary components of total Indian Ocean catches of the major tuna species (yellowfin, skipjack, albacore and bigeye tuna) in recent years. In 1985, these two species comprised 82 % of total tuna

catches in the Indian Ocean. On a worldwide basis, the 1985 catch in the Indian Ocean accounted for 14 % of the total world catch of major tuna species. Catches of skipjack and yellowfin tuna from the Indian Ocean were 15% and 14% of total world catches of these species in 1985.

The French/Spanish fleet is composed of large purse seiners (greater than 400 MT capacity; classification of the Indo-Pacific Tuna Development and Management Program).

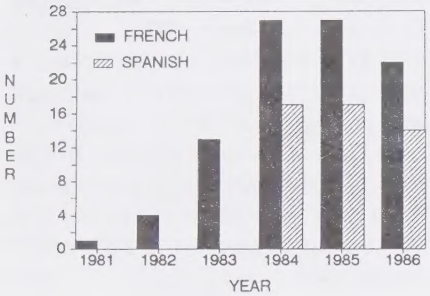


Fig. 1. Number of vessels in the French/Spanish purse seine fishery in the Indian Ocean.

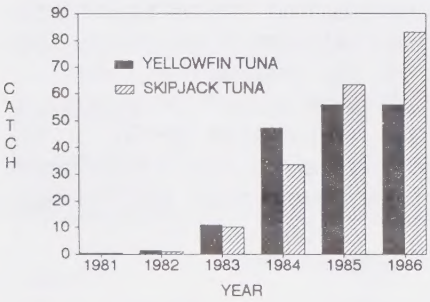


Fig. 3. Catch of skipjack and yellowfin tuna (1000 MT) 1981- 1986.

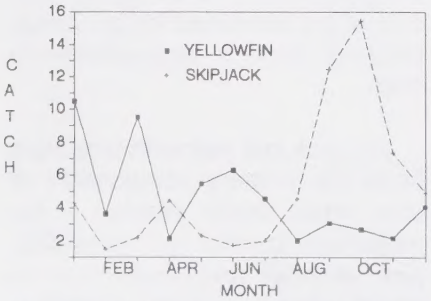


Fig. 4. Catch of skipjack and yellowfin tuna (1000 MT) by month in 1986.

The number of vessels in the fleet increased from 1 in 1981 to 44 in 1985 (Figure 1). In 1985, the latest year for which data on effort are available, vessels operated primarily between 10° north and 20° south latitude and from the coast of Africa to 75° east longitude (Figure 2). Most of the effort was concentrated in 8, 5° squares northeast of Madagascar.

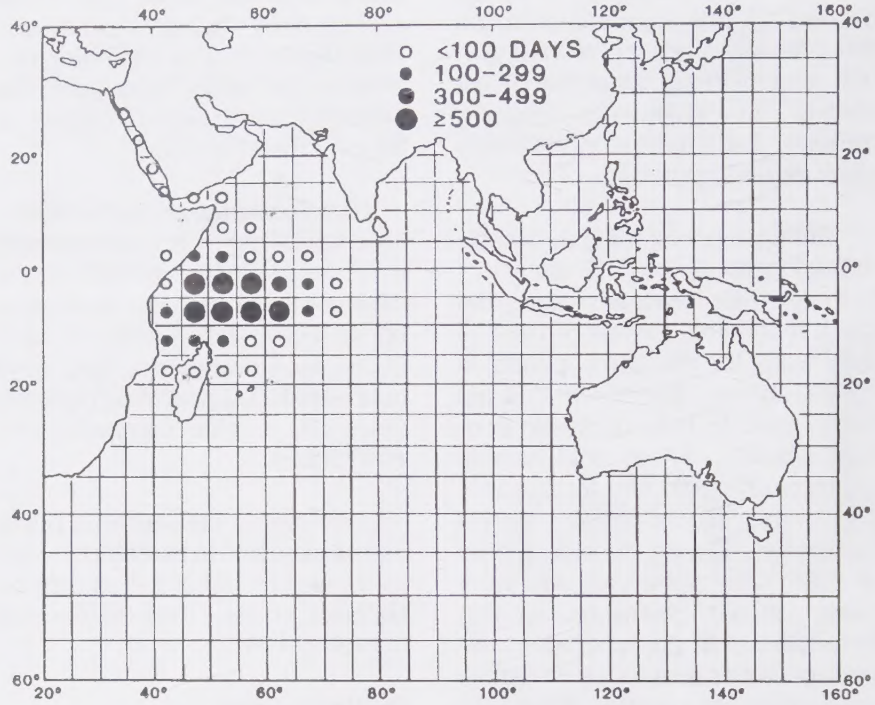


Fig. 2. Number of days fishing by area in 1985.

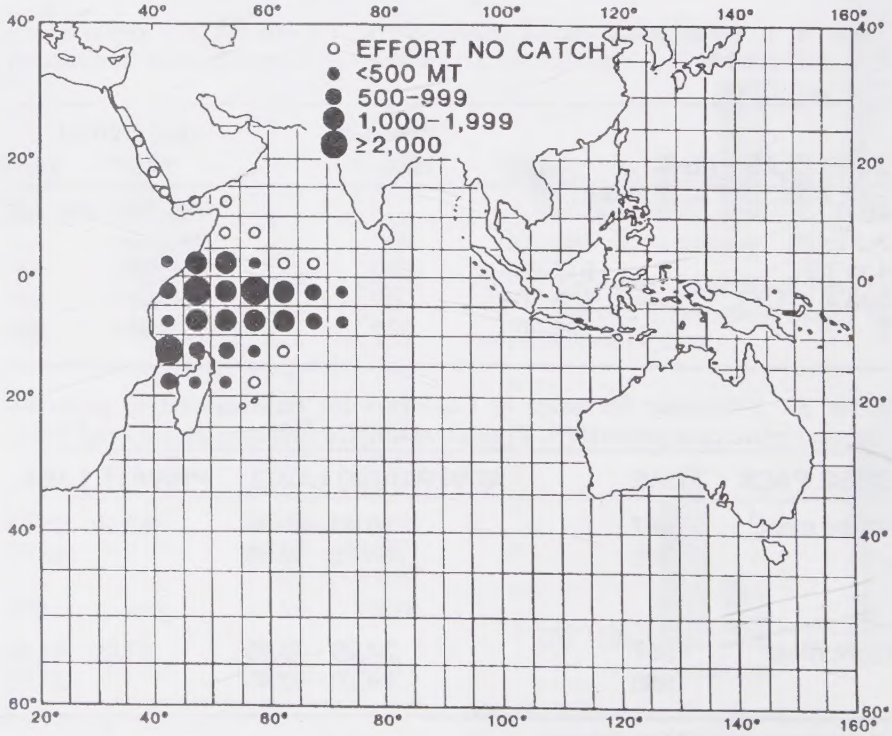


Fig. 5. Catch of skipjack tuna by area in 1985.

Catches by the French/Spanish fleet increased from 470 MT in 1981 to 139,000 MT in 1986 (Figure 3). The distribution of the catch between skipjack and yellowfin varies each year; in 1986, the catch was 60% skipjack, 40% yellowfin tuna.

The seasonal patterns of catches of the two species in the French/Spanish fishery appear to vary. In 1986, major catches of skipjack were made during two periods, March to May and August to December, with peaks in April and October (Figure 4). Major catches of yellowfin were made generally between January and August. The pattern is basically the same for 1985, the only other year for which we have data.

In 1985, the latest year that catch-at-area data are available, catches were concentrated northeast of Madagascar (Figures 5, 6). Catches of skipjack and yellowfin were made in the same general areas; major catches of yellowfin were concentrated in a smaller area than major catches of skipjack.

Sizes of skipjack tuna taken in the French/Spanish fishery in 1984, the latest year for which biological data are available, range from 28 to 80 cm (Figure 7). In 1984, there was little change in the size distribution over the season except that fish smaller than about 40 cm, which were present in the first to third quarters, were absent in the fourth quarter.

Sizes of yellowfin tuna in the 1984 catch ranged from 33 to 181 cm (Figure 8). Catches in the first through third quarters included fish from the entire size range; fourth-quarter catches were predominantly of fish less than 70 cm long.

Wes Parks, SWFC
Al Coan, SWFC

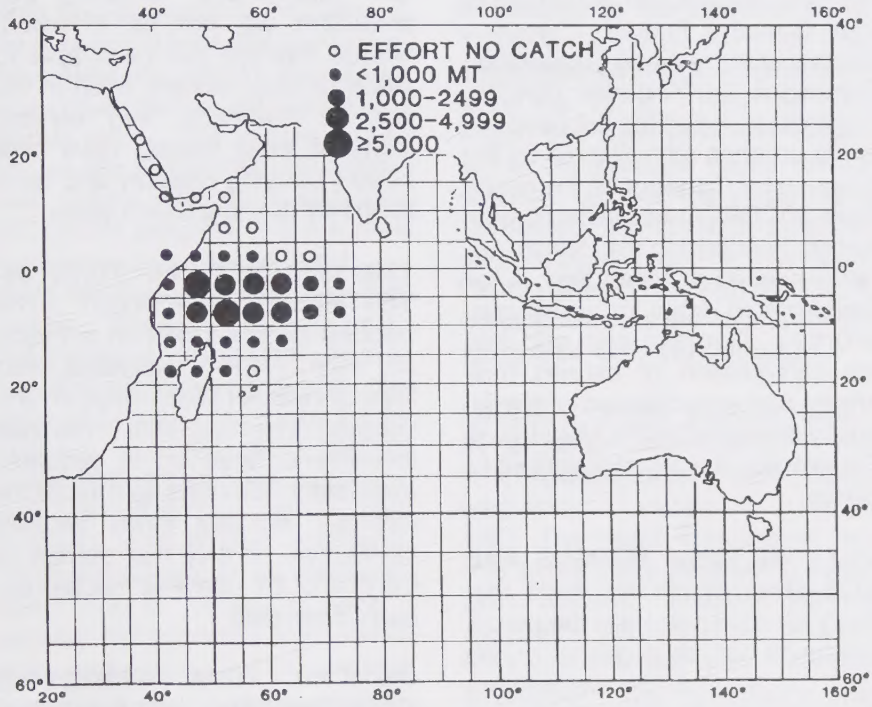


Fig. 6. Catch of yellowfin tuna by area in 1985.

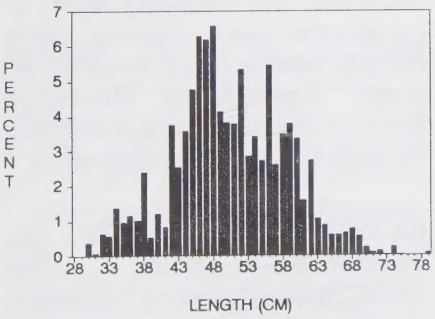


Fig. 7. Length distribution of skipjack tuna sampled from the catch of the French/Spanish purse seine fishery in 1984.

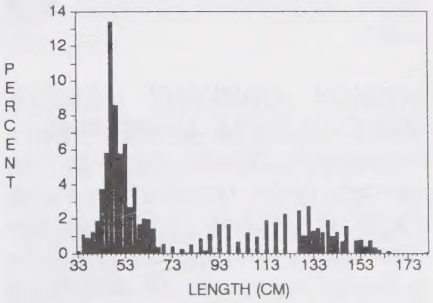


Fig. 8. Length distribution of yellowfin tuna sampled from the catch of the French/Spanish purse seine fishery in 1984.

RECENT DEVELOPMENTS IN TUNA FISHERIES

Editor's note. The following news items were compiled from reports of the NMFS Division of Foreign Fisheries Analysis, Office of International Fisheries Affairs, Washington, D.C.

REGIONAL

LATIN AMERICAN FISHERIES DEVELOPMENT ORGANIZATION HOLDS MEETING -- The latest session of the Tuna Working Group of the OLDEPESCA was held in Guatemala City, August 13-15. Mexico has been actively promoting efforts through OLDEPESCA to form a Latin American Tuna Fishing Organization (LATFO) for the Eastern Pacific. Unconfirmed reports suggest that the Working Group reached agreement on the final draft of a convention to establish LATFO. The issues decided at the Guatemala meeting included how to take decision (voting or consensus) and how to deal with countries outside the region who want to participate. Mexican officials hope to be able to sign the convention establishing

LATFO before the end of 1987. While this is possible, Mexican officials have previously been overly optimistic about the chances of reaching agreement. Ecuador and Chile have reportedly been the two countries that have expressed the most concern about the agreement.

EL NIÑO MOVES OFFSHORE--- The 1°-2°C water temperature anomalies, reported through early 1987 off the South American Pacific coast, have moved offshore leaving the temperature near the coast at normal levels. The heavy rains that have accompanied the El Niño event have also moved out to sea. A recent report, however, stated that in late June and early July the water off the Peruvian port of Paita registered a sudden warming of up to 2°C and that sardine schools have virtually disappeared. No information is available from the fisheries, but observers indicate that they do not believe the anomalies will continue. Fishermen reported excellent sardine and anchovy fishing south of Paita.

CARIBBEAN ISLANDS

BAHAMIAN AUTHORITIES REPORT U.S. LONGLINING VIOLATIONS -- The Bahamian Defense Force (BDF) reported intercepting radio communications between Florida-based fishermen longlining off Hope Town, Abaco without Bahamian licenses. BDF claims that up to four different U.S. boats were in the area, taking over 1.2 tons of swordfish. Bahamian fishermen claim that the illegal longlining catches have caused a shortage of billfish for sports fishermen, as well as a shortage of other species consumed locally. Fish have had to be imported from Nassau to meet the demand.

U.S. SWORDFISH VESSELS DEPART EASTERN CARIBBEAN -- All but seven U.S. swordfish fishermen have reportedly departed from the Eastern Caribbean for U.S. waters. Most plan to return in the fall. Four boats, formerly fishing out of Florida, are now permanently based in Puerto Rico and another three are fishing out of St. Croix, U.S. Virgin Islands. The St. Croix boats are reporting catches of about 2.5 tons of swordfish per trip, with increasing catches of yellowfin and bigeye tuna.

MEXICO

MEXICAN DEBT RESTRUCTURING AIDS TUNA INDUSTRY--The phenomenal 1986 increases in Mexico's tuna catch and exports are partly due to the Government's debt restructuring program, according to Jose Gonzalez Pedrero, Executive Director of the National Consultation Committee for Fisheries (CNCP). Gonzalez says that the debt restructuring program administered by the Program for Coverage of Exchange Risks (FICORCA) has assisted boat owners in obtaining the foreign currency needed to repay their dollar denominated debts for vessel construction. Gonzalez also said that the deregulation of canned tuna prices, and consolidation of the industry through CNCP's Mixed Tuna Commission has aided private companies.

MEXICAN TUNA SEINERS ARE IDLE--Mexican officials hope that the 13 idle tuna seiners in the port of Ensenada can be deployed during 1987. The Mexican Government has devised a plan for financing the activation of the vessels which, if deployed, could add 40,000 tons annually to Mexico's growing tuna catch.

FRENCH COMPANY ASSISTS MEXICAN TUNA MARKETING -- Pescado de Chiapas, the large new cannery under construction in the Pacific coast state of Chiapas, has signed a contract with Interpral, S.A., a French company, for assistance with export marketing. Pescado de Chiapas will process 14,400 t of tuna annually and an unspecified quantity of other species. Plans called for opening the plant in April, but details on the current status of the plant are unavailable .

MEXICAN TUNA FISHERMEN REPORT GOOD TUNA CATCHES DURING FIRST HALF OF 1987-- Mexican tuna fishermen are reporting good catches but below what the Secretary of Fisheries (SEPESCA) had anticipated. Fishermen caught 58,800 tons of tuna (mostly yellowfin during the first 6 months of 1987, a 7 percent increase over the 54,800 t taken during the same period in 1986. SEPESCA projected a 1987 catch of over 150,000 tons. At current catch rates, however, that projection will not be achieved. Mexico has still not been able to place 13 large seiners, idled in the port of Ensenada, into service. Many of these vessels have over 1,000 t carrying capacity and have been tied up more than 3 years.

1982-1986 MEXICAN TUNA INVESTMENTS REPORTED --The Seccion Especializada en la Pesca de Atun (SEPA) estimates that Mexico invested $533 million in tuna vessels during 1982-1986. The total investment, however, is probably even larger. It is not clear if the SEPA estimate includes funds actually contracted, or only that portion of the cost of the new fleet that has actually been paid.

MEXICAN TUNA MARKETING COORDINATED -- SEPA has contracted with Projectos y Servicios Maritimos company to study ways to coordinate the marketing efforts of the Mexican tuna companies. SEPA officials believe that they could increase earnings by channeling Mexico's increasing tuna production through a unified marketing effort.

MEXICAN TUNA PORT EXPERIENCES RAW TUNA SHORTAGE--Officials in Ensenada, Mexico's most important tuna port, are concerned about the increasing tendency of Mexican fishermen to land their catch in other domestic

ports or to transship their catch in foreign countries. The Mexican Federal Government is reportedly studying suggestions to facilitate the transshipment of Mexican tuna in foreign ports. Officials in Ensenada are concerned about the impact on the local economy. Alfredo C. Bernaldez, President of the Ensenada Management Coordinating Council, reports that 18 plants in Baja California have been adversely affected because they cannot obtain raw material.

MEXICAN TUNA VESSEL OWNERS REPORT PROBLEMS MEETING DEBT PAYMENTS--Antonio Suarez Gutierez, President of the Asociacion Nacional de Productores Atuneros (ANPA), claims that tuna vessel owners are caught in a vicious circle. The owners had to rely on the Fideicomiso de Cobertura Contra Riesgos Cambiarios (FICORCA) program to cover their foreign-currency-denominated debts for the construction of their vessels. Suarez claims, however, that the vessel owners now have to pay interest rates of almost one hundred percent. While the fishermen are reporting good catches covering their operating expenses, they claim that they cannot meet mortgage and interest payments. Other observers point out that the inflation rate in Mexico is such a problem that extremely high interest rates are justified. The Government is currently studying the situation and Suarez expects them to approve a new program to aid the vessel owners.

MEXICO PROJECTS RECORD TUNA CATCH--Mexico expects to catch a record 155,000 tons of tuna in 1987, a 34 percent increase over the 115,000 tons caught in 1986. Preliminary data for 1987, however, suggest that Mexico may not meet that goal. Antonio Suarez Gutierez, President of ANPA, indicated that Mexico hopes to export 100,000 tons (60 percent of the total) worth $100 million, principally to the European (Italian) market. Mexico has agreed to limit U.S. exports to 22,500 tons during the September 1, 1987-August 31, 1988 season not including the unused portion of the 1986 limit (17,500 tons) which Mexico was unable to supply because of prior commitments to European and Asian clients.

MEXICAN SPORTS FISHERMEN LOBBY TO RESTRICT COMMERCIAL BILLFISH FISHING-- Mexican sport fishermen are trying to convince SEPESCA to revoke commercial fishing (longlining) licenses for billfish. Mazatlan fishermen, one of the important centers for sport fishing, claim that their catches have fallen sharply in the past few years. Mazatlan fishermen claim that their catch rates have declined 80 percent since the 1970s. They are convinced that the commercial longlining is the principal cause for the decline. Most of the longlining is conducted by Mexican-Japanese joint ventures based in Ensenada. Having failed to convince SEPESCA, Mazatlan leaders are coordinating a nationwide lobbying campaign.

LARGEST TUNA VESSEL BUILT IN MEXICO COMPLETED -- The NAIR fishing company added a new tuna seiner to its fleet on June 14, 1987. The vessel, *Tramontana*, was built at the Navy shipyard in Salina Cruz, Oaxaca. It has a carrying capacity of 1,200 tons, which makes it the largest fishing vessel ever built in Mexico. The *Tramontana* was built with assistance from the National Fisheries and Port Bank (BANPESCA), the Fisheries Development foundation (FONDEPESCA), and SEPESCA.

MEXICAN INTERESTS EXPECT PROBLEMS MARKETING TUNA IN U.S.-- Alfonso Rosinol, Vice President of the Tuna Section of the Camara Nacional de la Industria Pesquera (CNIP), charges that Mexico has had difficulty marketing tuna in the United States because of a campaign organized by the conservationist group Greenpeace. Other observers maintain that Greenpeace has not affected Mexican tuna imports and that the reason Mexico may not fill all its first-year voluntary restraint shipments to the U.S. (17,500 tons) is that Mexico has commitments to European and Asian markets which it must honor. Greenpeace is reportedly concerned because Mexican fishermen, like U.S. fishermen, use porpoise to locate yellowfin tuna schools and there is an incidental porpoise mortality. Antonio Suarez, President of the National Association of Tuna Producers, says that the Mexican industry is working to reduce porpoise mortality.

Staff

Wes Parks, Editor
Pat Donley, Statistics
Jean Davis, Production Editor
Ken Raymond, Art Director

Contributors

Al Coan
Earl Weber

ORGANIZATION

Southwest Regional Office

E. Charles Fullerton, Director

Southwest Fisheries Center

Izadore Barrett, Director
Gary Sakagawa,
Tuna Program Coordinator

U.S. DEPARTMENT OF COMMERCE

NATIONAL OCEANIC AND ATMOSPHERIC ADMINISTRATION
NATIONAL MARINE FISHERIES SERVICE
SOUTHWEST FISHERIES CENTER
8604 LA JOLLA SHORES DR-P.O. BOX 271
LA JOLLA, CALIFORNIA 92038

OFFICIAL BUSINESS
PENALTY FOR PRIVATE USE, $300

U.S.MAIL

POSTAGE AND FEES PAID
U. S. DEPARTMENT OF COMMERCE
COM-210

LIBRARY
NATIONAL MARINE FISHERIES SERVICE
SOUTHWEST FISHERIES CENTER
2570 DOLE STREET
HONOLULU, HAWAII 96822-2396